

AlwaysOn: DocumentServer

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WE LIVE BY THE DOCUMENT

The *AlwaysOn:DocumentServer* from Ontivia Limited is enterprise-grade server software for the auto-generation of documents, where the document is based on a business-unit created template which the server populates with live data it fetches from the databases of enterprise applications.

The business world lives and breathes through documents.

We communicate through documents with our customers and suppliers alike, and create masses of reports and briefings for internal consumption too.

These documents are usually a

mix of pre-written (static) text plus dynamic business data.

Modern Enterprise Applications usually contain a proprietary report creation tool, allowing IT staff to create and format a custom report or document, which can include current data pulled from the applications' database. Often these reports must be viewed in a proprietary viewing application.

Every step of this typical process is expensive.

The IT cost to create and maintain these documents/reports is considerable. Even modifications and re-formatting of these

documents is expensive and time-consuming.

The end result is expensive and long lead-time document definition and a frustrated user and stakeholder community.

Today's progressive Enterprise can break out of this downward spiral with the effective and easy to deploy Ontivia AlwaysOn DocumentServer.



"We communicate through documents with our customers and suppliers alike.."

BENEFITS OF THE DOCUMENT SERVER

The DocumentServer allows IT departments to deliver enhanced results, at a reduced initial and maintenance cost;

- Empower business-units to create and maintain their own document templates, rather than encumbering the IT dept
- Create templates in standard MSWord or MSEXcel, therefore no extra training requirements
- Achieve a rapid change and deploy cycle
- Define abstractions to enterprise data once (in the Global Repository) and reuse multiple times for different templates
- Utilize data from multiple different enterprise databases in the generation of each document
- Define manipulations to the source data for formatting and presentational purposes
- Deliver generated documents by email, saving to file, writing to database or

streaming back to the creator/requestor. Even convert to PDF format.

- Schedule documents to be repeatedly generated at a fixed time interval
- Automatically log all document requests
- Create a central library of document templates, enabling rapid re-branding and re-formatting.
- Keep control with deployment and error monitoring features

ONTIVIA LIMITED

Ontivia Limited specializes in providing business productivity and enterprise integration software.

The *AlwaysOn* suite of server software has been created to address Enterprise pain-points and thus enable efficient realization of business goals.

LET BUSINESS-UNITS OWN THE DOCUMENTS

The solution for the unwanted IT costs and delays caused by proprietary report creation tools in Enterprise Applications is simple;

Let the business-units own the documents.

The DocumentServer provides an effective separation of presentation from content.

Business-units lay out documents, using familiar desktop applications eg MSWord. They apply formatting, logos etc as required.

They also define where Enterprise data should be inserted, by placing named fields in the document, choosing these fields from

those available in the DocumentServer Global Definitions Repository.

Saving the document to the Template Repository makes it instantly available to all users, replacing the previous version.

No IT work is needed!



Business-units create and maintain the documents, making changes whenever needed and releasing new versions immediately.

I.T. DEFINES ACCESS TO DATA

The IT department should create a set of meta-data definitions in the DocumentServer Administration Console. These definitions are stored in the Global Definitions Repository.

The definitions are named, and act as instructions to the DocumentServer, defining what Enterprise data-sources exist and how records should be extracted from them. For example;

Customer may be the name given to the definition of how to access Account data from the CRM application. The fields in that record may have unintuitive names, so they can be aliased within the Repository. For example, CustomerLegalName, could be the alias for the field called x_legal.

The same approach is taken for sets of records, eg the set of order-lines in an order.

Some major benefits are;

- Access data from anywhere in the Enterprise, not just one application
- Define once, use many times, for consistency
- Security and performance controlled by IT

These Global Definition field-names are placed as needed into templates by the business-unit template owners.

“...data from anywhere in the Enterprise, not just one application.”

REQUESTING DOCUMENT GENERATION

Requesting that a document be generated causes the DocumentServer to query the relevant enterprise data-sources for records, and then to populate the relevant document template with that data.

The DocumentServer can accept requests in several different ways, enabling users or IT departments to choose the method they are most comfortable with;

- An email can be sent to the DocumentServer.
- An XML file can be saved to a pre-defined folder
- XML data can be HTTP posted to the DocumentServer
- A web-service can be consumed

For example;

The IT department might add a button to a CRM “customer

account” screen, which when pressed makes an HTTP Post to the DocumentServer, asking for a Contract document to be created, containing the customer contact details.

Business-units creating or updating a template document might test that document by manually requesting a document generation via email.



Requesting a document is this easy.

DOCUMENT DELIVERY OPTIONS

The DocumentServer offers several document delivery options, which can be used individually or in combinations. The required options should be specified in the document generation request.

The options available include;

- Saving to file-server
- Saving to database
- Emailing

- Streamed back to the application that requested it, for display and/or storage.

Additionally, the document may be converted to unaltered Adobe PDF format before any of these options are performed.

An example usage is;

When contracts are generated for customers, the document could be converted to PDF, emailed to the Legal Dept, saved to a folder acces-

sible by the Customer Service Representative and finally stored in an Enterprise Contract database.

These options and the contact details applicable would be specified in the request initially sent to the Document Server.



Delivery options include; email, saving to file or database and streaming to requestor

FEATURES

A windows hosted service, complete with administration console.

Operates in synchronous or asynchronous modes.

The asynchronous mode allows load-balancing across multiple servers for scalable operations.

Populates templates with Enterprise data from multiple applications, converts to PDF, saves in file-system or database and emails to user. All in one request.

Every request and every document delivery is logged to database for security and audit purposes.

Use the console to;

- Add data definitions to the Global Repository (from where they can be included in document tem-

plates)

- Define manipulations of the retrieved data (eg concatenations, simple math, formatting, pre-fix and post-fix values, handling when records or values are null)
- View past and current requests
- Manually re-initiate past requests
- Set repeat flags and repeat frequencies on requests
- View a log of delivered documents

Supported document generation request methods;

- File in folder
- Web-service

Document generation requests can specify fine control over the operation or rely

on defaults.

The synchronous web-service method can supply an empty (or full) template, and can request full or no generation, and can request conversion to PDF or no conversion.

Supported document delivery methods (any combination);

- Email
- Saved to file
- Saved to database (as a CLOB)
- Streamed back to requestor
- Conversion to PDF

Supported document template formats;

- Microsoft Word
- Microsoft Excel

Populate a template with Enterprise data from multiple applications, convert to PDF, save in file-system and email to user: All in one request.



Create reports and documents via a single request

MINIMUM REQUIREMENTS

The DocumentServer engine runs as a Windows service. The Administration Console runs as a windows application.

Minimum requirements are;

- Windows 2000 SP1
- .Net v1.1
- MS SqlServer 2000

To fully use the variety of request and delivery options the following would also be required;

- SMTP account
- File-server access
- Database access

To create document templates MS Word or MS Excel

must be used.

To view generated documents, MS Word, MS Excel and/or Adobe PDF Viewer must be used.

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Ontivia Limited

Incorporated in Alberta in 2002, Ontivia Limited has been supplying Enterprise Application Integration services and innovative business productivity software to Canadian and international companies ever since.

Ontivia's new *AlwaysOn* suite of business productivity software is designed to improve your ability to serve your customers whilst making best use of your budget and IT department time.

The DocumentServer is the first product release in the *AlwaysOn* suite.



Calgary. Alberta's booming Southern city, and home of Ontivia Limited.

ONTIVIA LIMITED

PRICING & SUPPORT

The DocumentServer is made available under a per server licensing agreement.

Call for details.

The Administration Console and the MSWord macro are provided at no extra charge with the server license.

The first year maintenance is included in the license fee,

and subsequent years maintenance is charged at 15% of purchase price, on the anniversary of the first purchase.

Telephone support is available to licensed users during normal business hours, excluding public holidays in Alberta;

Mon-Fri 9am-5pm MST